# Sample: Instructions for POMP Survey Interviewers

**Note: These instructions are for interviewers who will be calling from their homes using pre-paid phone cards. Details refer to one agency's specific survey tracking system involving a separate tracking sheet for each person to be called and a log book to keep track of these sheets. Details of your study may differ, but these are the *types* of details you will need to include in your written instructions.**

## Before you begin the Survey

**At ___[your agency]**

- Pick up ___ [number] of new contact sheets the first time and take more as needed on each visit. Check in a *minimum* of once a week.
- For each contact sheet you take, find the client's contact information in the POMP Logbook and put your initials and the date in the appropriate block to indicate you've taken it. We'll be printing the survey letters in batches alphabetically. The entries in the log book will be ordered by the last name of the person to be contacted (the subject) within each batch. We have given numbers to *all* the subjects in the study, but there are some for whom you'll never get a contact sheet because we have learned that they are deceased or because they asked not to be called.
- The POMP Logbook, contact sheets, and completed surveys will be stored ___[where stored]. If you need to get or return materials and ___[survey coordinator] isn't available, consult with ___ [back up person].
- You will be given a sheet with phone card numbers and PINs. Begin by using "your" card. [Describe needed details of using phone system or phone cards here]

**Before your monitored call(s)**

- Read the survey aloud several times. In addition to the practice you do in the office at the conclusion of the training, practice asking the survey to a friend or family member. *You can claim up to one hour of reading and practice at home on your time sheet before you make your monitored call*. (If you need additional practice time, talk to _____.)
- Make sure you have the phone card number and are familiar with the directions for using it as well as the information about how to use the phone system in the office for local and long distance calls. (These directions are found in your folder.)

**Your monitored call(s)**

- Before you speak to any respondent alone, you must make at least one call in which you are monitored by one of the survey team leaders. After that call, the person monitoring it will give you feed back and suggestions. If the call went very well, you will then be cleared to do interviews on your own. If not, you will be assigned more practice with survey staff before trying another monitored call.
- Sign up for your monitored call on the sign up sheet available at the end of the training.

***Every* time you begin making calls**

- Make sure you are familiar with the information from the contact sheet that you will need in introducing the survey. This will include the name of the subject you are calling, the type of service he or she receive and the name of the agency providing the service.
- Read over the letter the contact received so that you can read it aloud to the subject comfortably if necessary.
- Some people—particularly older ones—have trouble understanding calls from cellular phones. Please use a traditional telephone for your calls.

## Calling the Subject

- If you do not get an answer to your call, try again on a different day or a different time of day (e.g., morning vs. afternoon). Attempt *at least* 5 times and no more than 7. After 2 or 3 unsuccessful tries, wait a week before you call again to allow for vacations, illness, or other temporary absences.
- **Do not count busy signals as attempts**, but keep a tally of them at the bottom of the Contact Sheet. If you get 7 or 8 busy signals at different times of day, and different days of the week without ever reaching a machine or a person, discontinue trying. Code as N1: "bad phone/disconnect."

## When Talking to the Subject

- Use the Introductory script with everyone. You may change the wording slightly to make it more comfortable, but do not add or omit information.
- You **may** leave messages on answer machines. If you do, use the answering machine script (there's a copy on a separate sheet in your information packet):

    Hello,
    This is _________________ calling on behalf of ___[the organization sponsoring the survey]. I hope you received a letter recently from the ___, ____[name and title of person signing invitation letter], telling you about a survey we are conducting. If you have any concerns about whether this is a legitimate survey, please call ____ at the [name of local AAA or provider]. Her number is _____. That is a local call for you.

    I'll call back in a few days, and I hope I'll have a chance to speak with you then. Thank you

- As a general rule, do not leave messages when a person other than the subject answers the phone. Just try to get a time to call when the subject will be there (this is to avoid asking people to return a long-distance call and more importantly to protect their privacy). Use your judgment about telling the person who answers that you are conducting an opinion survey under supervision by the UNC School of Social Work and that the person you're calling has received a letter about it. People are sometimes reluctant to give a time to call back, and this information may put them at ease. Under no circumstances reveal that the survey is for people receiving services or anything about the content of the survey.

- **If the subject has not received the letter**, offer to send them a copy.
  - Read them the address on the Contact Sheet, and ask them for any corrections needed.
  - Give them the name and number of the provider who serves them if they wish to confirm that this is a legitimate survey. [Add information specific to identifying which name and number should be provided to any given client here]
  - Ask if they are willing to complete the survey now, or if they would prefer for you to call back after they have had time to receive a copy of the letter. Be sure to make a note on the Contact Sheet so that you'll know when to call back.
  - Give ____ the names and address corrections so she can send a new letter. If she is not in the office, leave the information _____[insert back up plan for getting letter out in absence of the person who will normally be handling it].
- **To the best of your ability, read the questions verbatim**. This will ensure consistency in survey administration across interviewers and contact people. If the subject asks you what a question means, ask them to just answer what they think it means. Read the question again slowly. You may use your voice to emphasize key words or phrases that they may not have understood.
- Be aware that talking about these questions may be difficult for some subjects. If this appears to be only mild or moderate sadness, be sympathetic but try to keep moving forward with the survey. If the person appears to be in real distress follow the **protocol for subjects in distress** in your packet.
- If you make a mistake marking an answer, **mark the correct answer with one of the red pens you were issued**. The data entry person will always enter the red answer if there are two.

## After the Phone Call

### After an Unsuccessful Attempt

- Code the result of individual attempts in the "call results" columns on the Contact Sheet.
- Use the "Comments" column to note a good time to call back, a specific appointment, or anything else that will help on the next call.
- If you get a final result (refusal, never received services, etc..), mark the appropriate result code number on the Contact Sheet.
- Turn in just the Contact Sheet for surveys that were not successful—don't attach a blank survey.
- Enter the date you returned the Contact Sheet and the final result code in the logbook. Codes are the same as on the Contact Sheet and also appear at the bottom of the logbook page.

**After a Successful Attempt**

- In the gray box at the top of the first page of the survey, enter client's ID number and the date you conducted the survey.
- Look over the questionnaire. Have you made any errors in marking? Please mark the correction in red.
- Look at any open-ended answers or comments you have written. Could someone else read them? If not, please write them again more clearly.
- Code the final outcome on the Contact Sheet *and* in the logbook.
- Turn in the survey with the Contact Sheet paper-clipped to it.